SiteScape Forum

Quick Start Guide for Administrators

This manual provides lists of steps that Forum administrators need to perform during the initial configuration of the Forum software.

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SiteScape Forum Version 5.0

Forum Administration

As an administrator, you need to configure the new Forum installation so that it is usable, work with your users so that you can set up the Forum software to facilitate collaboration, and troubleshoot problems with Forum. As an option, you can also customize Forum so that it better serves your users and reflects the "look and feel" of our organization.

In addition to reading the information provided in this document, we invite you to participate in SiteScape's support, Help, and customization forums. These forums provide a greater level of detail (especially about some of Forum's more technically challenging features), collaborative exchanges with Forum engineers and with members of our support team, and the most up-to-date information available about Forum. For more information, use the following URLs to access these forums:

Support:	http://support.sitescape.com/forum/support/dispatch.cgi
Help:	http://help.sitescape.com/
Customization:	http://support.sitescape.com/forum/support/dispatch.cgi/custom

Forum Architecture

This topic provides a brief introduction to the Forum architecture. For most administrative tasks in Forum, you do not need to have a working knowledge of the architecture. For example, to create forums, set access control, establish authentication, and more, you only need to know how to use the administrative menus.

However, if you are curious about how the Forum software works, if you encounter problems that require troubleshooting or working with the SiteScape support team, or if you intend to write code using the Forum Toolkit, then it is very helpful for you to understand the Forum architecture.

For those who want to get started with Forum Administration, you may want to skip to the Initial Forum Configuration topic.

The architecture information in this topic is only an introduction. For a more complete description of the Forum architecture, see the Administration Help system.

Forum Components

The Forum software environment is comprised of the following components:

Access Control Areas (ACAs)

An access control area (ACA) is where SiteScape Forum stores information, defines who can participate, and defines what rights those people have to access or modify the information. Your application's users see an access control area as the "Summit Page": the page on which you log into SiteScape Forum's environment and choose forums to access.

Typical installations only use one access control area, but it is possible to configure multiple ACAs for an installation. An ACA maintains separate data, but shares the processes and other software components mentioned below.

The background monitor and broker

The background monitor is in charge of managing non-interactive tasks that forum applications may require. The Background Monitor (process name: `avf-background`) is a simple control process that acts as a gateway and scheduler to the broker, which takes background requests, executes them, and monitors their progress.

The broker (process name: `broker`) maintains a set of work queues so that background requests are serialized and do not saturate the server.

The background monitor has an auxiliary job of starting and stopping the bridge monitor, which controls the interactive part of the software.

The butler

The butler is a console (command-line) application which provides access to nearly all of the SiteScape Forum Toolkit capabilities. The butler is used to execute non-interactive tasks and also has unique capabilities for managing SiteScape Forum (for example, it can create and destroy access control areas and perform other management-related tasks). The butler is the primary (but not sole) means by which the butler performs background tasks.

The butler is also useful for debugging your applications. You can execute your application's commands using the command-line interface. To access the interface, do the following:

UNIX Systems:

1. `cd` to the SiteScape Forum installation directory.
2. Enter the following command:

   ```
   > avf-butler
   ```

3. The butler prompt appears.

NT Systems:

1. In Windows Explorer, go to the SiteScape Forum installation directory.
2. Double click on the `avf-butler.exe` file. Windows displays a command prompt window with the butler prompt.

The chat server

The SiteScape Forum chat (or IRC) server can be configured to run as part of normal SiteScape Forum operations. The Administration forum provides the tools for configuring the chat server, which is actually run as a background task (through the broker).

The dispatcher

The dispatcher is the heart of the product. Nearly every interaction you have with SiteScape Forum through your browser is processed by a dispatcher process. A typical installation has three (3) dispatcher processes, which remain in memory to service requests for your server regardless of how many ACAs are configured. (If you have fast server hardware, it can sometimes improve Forum performance to increase the number of running dispatchers.)

Transactions from browsers are relayed to the dispatchers by the CGI bridge program. The dispatchers analyze the request and execute the application scripts required to service the transaction. The dispatchers also use access-control policy information stored in the ACA to enforce logins and access restrictions that have been established.

The CGI bridge

The CGI bridge program relays HTTP requests from the hypertext server to the dispatcher and returns the response data. The bridge program is a (Common Gateway Interface) program, which means that it only exists for the life of a transaction. The bridge process is created by the hypertext server. The bridge process then locates a dispatcher and sends the request to it for processing. If all the dispatchers are busy, the bridge waits for one to become available.

The bridge monitor

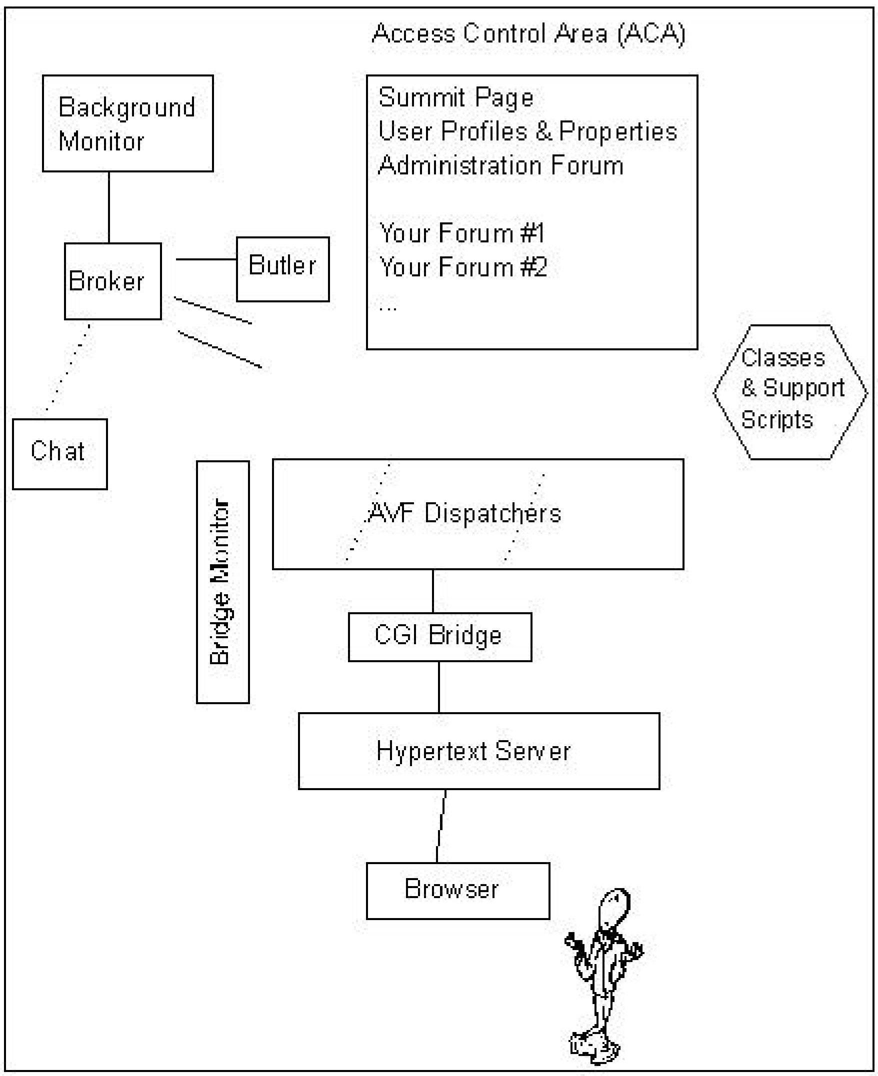
The bridge monitor is another instance of the CGI bridge program running in a special mode that creates and monitors the dispatcher processes. If a dispatcher shuts down for some reason, the bridge monitor will replace it with a new one. If a shutdown of SiteScape Forum software is requested, the bridge monitor shuts down the dispatchers.

Classes and support scripts

Most of what people see as SiteScape Forum functionality is located in application class files, modules, and other support scripts. These scripts and programs are executed by the dispatcher, butler, and broker to create the SiteScape Forum environment.

Architecture Diagram

The following is a diagram of the Forum architecture:



The Background Monitor and Broker

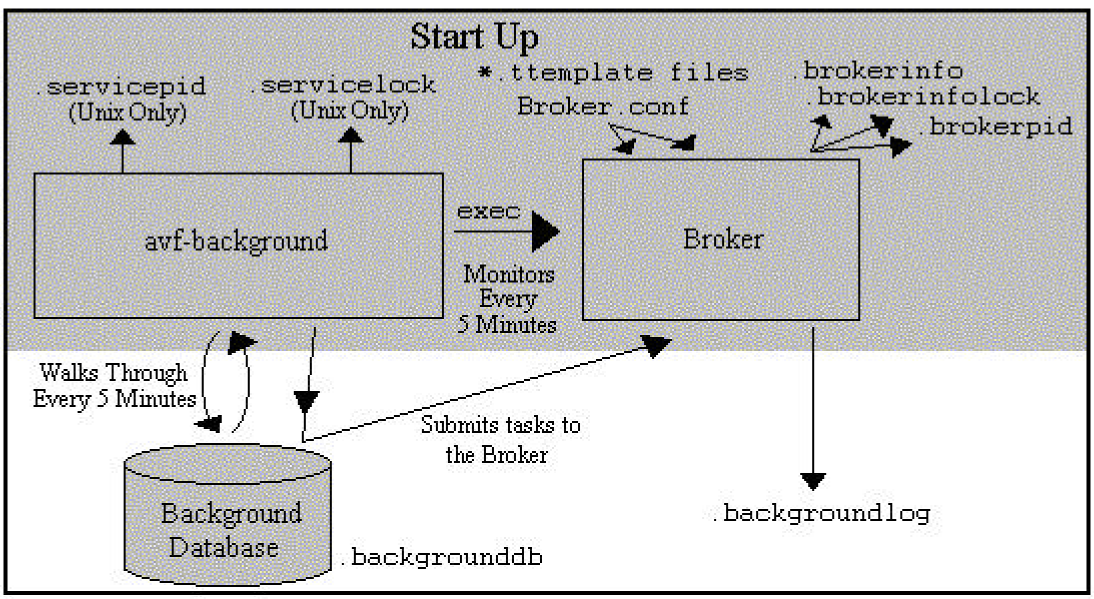
Numerous non-interactive SiteScape Forum tasks, such as mail notifications, messaging, the IRC chat server, and news, require the background monitor to schedule tasks and submit them to the broker when required. The background monitor has three main functions:

- Ensure that the broker is running. The broker executes SiteScape Forum tasks. Task requests can come from `background/.backgrounddb` or from a direct request through a background submit command. (Please refer to the SiteScape Forum Toolkit Help for details about this command.)
- Periodically check `.backgrounddb` to identify tasks that must be submitted to the broker.
- Start and stop the bridge monitor.

When the background monitor is started, it sleeps for 5 minutes, then checks the broker using the command `background submit -command test`. If the check returns 0, then the broker is running; otherwise the background monitor starts the broker. The background monitor then examines the `.backgrounddb` file for tasks that are ready to run, and notifies the broker of such tasks using the **background submit** Toolkit command. When completed, the background monitor goes back to sleep for 5 minutes and then repeats these steps.

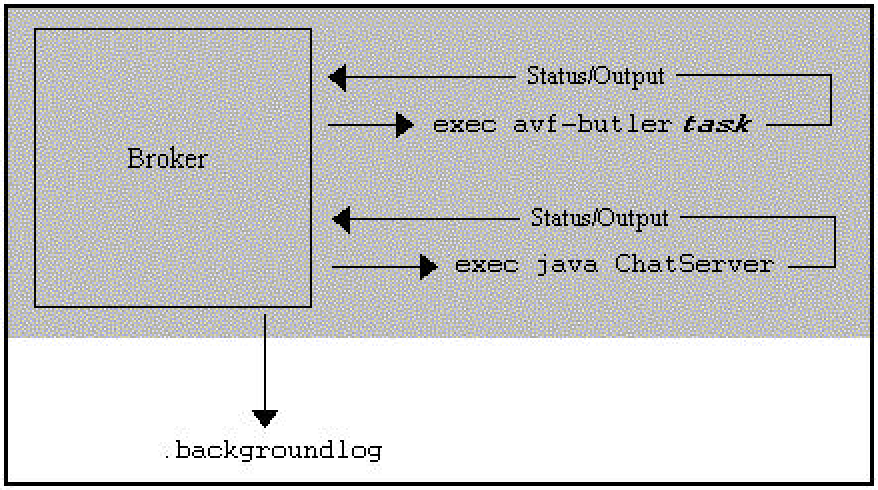
If the background monitor is down and you then restart it, there is a 5 minute delay between the time that the background monitor starts and the time that the following start: the broker, mail notifications, messages, and the chat server.

The following graphic details the background processes in SiteScape Forum:



The broker is a Java application that executes and monitors non-interactive SiteScape Forum tasks. Task requests can come from the `.backgrounddb` file, the background monitor, a class, or from the butler.

The following graphic details the operation of the broker:



Communication with the broker is achieved by a socket connection with the background submit Toolkit command. The broker processes can be found as follows

1. Check `background/.brokerpid` to identify the pid for the broker.
2. **Tru64 UNIX systems**: use the command `ps auxww | grep pid` to identify the pid

   Solaris systems: use the command `ps -aef | grep pid` to identify the pid

   NT systems: In the Windows Task Manager, click on the Process tab, then click the pid column in the Processes display to sort the display by pid. The broker pid you identified in Step 1 has the process name `java.exe`. (There may be more than one such process at a given time. For example, the IRC server is also called `java.exe`.)

At startup, the broker reads a configuration file, `broker.conf` , and all files in the `/classes` directory that have the extension `.ttemplate`. The broker creates the following files:

`.background log`	This is the broker log file. It contains information on successful and unsuccessful tasks, as well as each task's `stdout` and `stderr` streams.
`.brokerinfo`	This file contains the host name of the system that the broker is on as well as its port number. This file is used by **the background submit** Toolkit command to connect to the broker.
`.brokerinfo lock`	This file locks `.brokerinfo`.
`.brokerpid`	This file contains the pid of the `broker` process.

The broker starts up with several default configuration values. These configuration values are as follows:

`ProcessMax`	Defines how may tasks the broker can run at any given time. A task runs in a process slot. The default value is 7.
`ReservedSlots`	Defines the number of process slots that are reserved for high priority tasks. Tasks have either a high or a low priority. These priorities are defined for each task in the `.ttemplate` file in the `/classes` directory. The default value is 5. A high priority task can run as long as one of the five (default) process slots is available. If `ProcessMax` is set to its default of 7, the default value for low priority tasks is 2 (7 - 5). If the low priorities max (`ProcessMax - ReservedSlots`) has been reached, low priority tasks cannot run and must wait until another low priority task finishes. This ensures that high priority tasks always have priority over low priority tasks.
`TimerSleepInterval`	Interval that the broker monitor process sleeps before checking the state of its tasks. This value is in milliseconds. It's default is 20000 (20 seconds).

At startup, the broker writes out the `ProcessMax` and `ReservedSlots` values to the `background/.backgroundlog` directory. It also writes out all the task names for which open process slots exist.

Initial Forum Configuration

This section describes all of the steps necessary to set up a Forum installation so that it is minimally functional. Some of the steps are optional; choose the ones that make sense for you and your users.

What you need to do…	Why you want to do it…
1. Log in as an administrator	Logging in as the **wf_admin** user allows you to perform all of the administrative tasks for the current summit and the ACA.
2. Set access to the summit	You need to decide who has the right to view your summit.
3. Set access to the user database	You need to decide whether users have the right to create and maintain their own user profiles.
4. Register users	If you set the summit access so that users cannot register themselves, then administrators have to do this task.
5. Create groups	You need to be able to create and manage groups to take full advantage of Forum's access-control list (ACL) tables.
6. Set access to user features	There are many optional features that you can turn off, if you choose.
7. Establish e-mail settings	You must specify an e-mail server to enable Forum's mail features.
8. Establish settings for the Web File System	You can disable the Web File System or choose another directory as the system's base directory.
9. Customize the summit	You may want to change the name of the summit so that it reflects your organization's name, or you may want to add introductory text to the welcoming messages.
10. Create a docshare forum	You need a docshare forum to take advantage of most of Forum's collaboration features.
11. Enable a docshare forum for e-mail notifications and postings through e-mail	Users cannot receive e-mail notifications of new or changed docshare entries unless you enable this feature.
12. Set access to the docshare forum	Determine who has the right to access, use, and administer the docshare forum.
13. Make sure that your users have "getting started" information	Users need help in getting started with Forum.
14. Create the Toolkit Help system	You cannot view this Help system unless you "create" it, first.
15. Read *Getting the Most Out of Forum* (don't worry, it's brief)	Configuring Forum and leaving the summit empty is not enough to create a useful, intuitive collaboration environment. There are a few more tasks you need to accomplish, before that can happen.

Logging in as an Administrator

To perform the initial set up of Forum, you must be logged in as a member of the SSF Administrators group. By default, there is one member of this group: **wf_admin**.

To log in as the **wf_admin** user, do the following:

1. View the summit page
2. Type **wf_admin** in the "Login name" text box.

   Either press Tab (Netscape) or Return (Internet Explorer) to move to the next line of the form.
3. In the Password text box, enter the administrative password that you specified when you installed Forum.
4. Click on the "Log in" button, as follows:

Setting Access to the Summit

You need to decide who can access your summit page and what they can when they get there. By default, *anonymous* users (users who do not log in) can view entries, but they cannot participate in forums (such as having discussions in docshare forums). Users who log in are allowed to participate.

To change the default access to the summit, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (**wf_admin**, by default).
3. Click on the Administrate button, as follows:

4. In the Manage Summit row of the table, click on the **Control Access to this Summit and Administration Tools** link.

   Forum displays its standard *access-control table*.
5. Alter the access-control table as needed, checking and unchecking boxes to alter the granted privileges. If you choose, you can use the links at the top of the page to add a group row to the table. The following are common alterations made to this table:

   - To disable summit access by anonymous users, remove the check in the Anonymous Users row and the View Summit column.
   - Do not remove the checks from the SSF Administrators row. If you do, it is possible that no remaining user will have access to the summit's ACL tables and administrative tools menu.

Using ACL Tables

As an administrator, one of your main tasks is to determine which users have the right to perform which set of tasks in Forum. You control these rights using Forum's standard *access-control-list* table (*ACL table*).

ACL tables list groups of users in the left-most column, and they list the rights along the top of the table, as linked column headers. If a group of users has the right to perform a task, then in the group's row and the right's column, you will see a checked box. To remove a right from a group, click on the check box to remove the check.

The following are the default set of groups found in all ACL tables:

Registered Users
: Users who are logged in

Forum Creator
: The user who created this forum

Forum Owner
: The user who owns this forum (by default, the same person who created the forum).

Anonymous Users
: Users who are not logged in

SSF Administrators
: Users who have the right to access the top-level summit's administrative tools menu.

  By default, the only member of SSF Administrators is the **wf_admin** user. Also by default, members of SSF Administrators often have the right to perform administrative tasks in individual forums on the top-level summit.

Entry Creator
: The user who created an entry (such as a docshare discussion topic).

Entry Owner
: The user who owns an entry (by default, the user who created it).

If you want to add a group (row) to the ACL table, click on either the **existing group** or **create a group** links. When you are finished working with those forms, Forum adds the group name as a row in the ACL table.

In the ACL table, to modify a group's membership, click on its linked name (in the left-most column of the table). If you want to give or deny access to users or host machines without having to work with groups (for example, to deny access to a single user), then do the following:

1. Click on the linked name of the right (one of the column headers in the table).
2. On the "Other Options for Access Right..." form, click on the Modify button.
3. Specify the usernames or host machine names to which you want to grant or deny this right.

4. Click on the OK button.

To eliminate all changes that have ever been made to the ACL table (to return to its default settings), click on the **factory defaults** link in the text preceding the ACL table.

This ACL Table's Rights

The following are the rights in the ACL table for summit access:

View Summit
See the summit page.

Manage this Summit
Perform administrative tasks that are unique to this summit page (such as create forums on the summit).

Manage the ACA
Perform administrative tasks that apply to all summits on this Forum installation (such as register users and create groups).

Modify Access Control
Change the values on this ACL table.

Set Access to the User Database

When you *set access to the user database*, you determine who has the right to create user profiles, modify them, and more.

To change the default access to the user database, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. Click on the Administrate button, as follows:

4. In the Manage Users row, click on the **Control Access to the User Database** link.

   Forum displays the user database's *access-control-list table* (also called an *ACL table*).

5. Check and uncheck the boxes to alter the access control to the user database. Altering this access affects activities such as creating users, modifying them, deleting them, indexing the user database (index the user database when users report having difficulty searching for usernames that should be in the database), and so forth. The following are common alterations to this table:

   - You can disallow anonymous users from being able to register themselves, requiring an administrator to register them. To do this, remove the check from the Anonymous Users row and the Create Users column.

- It is a good idea to continue to grant access-control and administrative privileges to the SSF Administrators group; generally speaking, do not remove the checks from this row.

This ACL Table’s Rights

The following are the rights in the ACL table for summit access:

Join private chat rooms
This right has no effect.

Join public chat
This right has no effect.

Create users
Create a user profile by registering a username and password, and other information.

Create Groups
Define a group name and which users belong to the group.

Modify or Delete Groups
Change a group's membership or delete it.

Modify user information
Be able to change any *user profile* in the database. (This right does not work for some of the groups: for example, entry creator and group owner).

For example, you can create a group whose job it is to maintain user profiles and groups. Then, you can assign to this group this right, the Modify or Delete Groups right, and the Create Groups right. (Make sure that these users also have the right to access the summit's ACA-wide tools.)

Users can modify their own profile
Allows users (for example, Registered Users) to modify their own user profiles.

If you use LDAP synchronization, you may want to take this right away from Registered Users, since their modifications would be overwritten every time LDAP syncronized the user profile with the information from the X.500/LDAP database.

View User/Group Information
View public information (such as a person's *business card*, which contains contact information) about a user or group.

Delete users
Delete user profiles.

Modify Access Control
Change values in this ACL table.

Register Users

When someone *registers* a user, that person gives the user a username and password, specifies other useful information about the user (for example, an e-mail address), and establishes settings that affect the users environment in Forum (for example, indicating that Forum should supply a personal calendar).

By default, users are allowed to register themselves. Members of the SSF Administrators are also allowed to register users. A common task is to register a few highly trusted users whom you want to add to the SSF Administrators group.

To register a user, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. Click on the Administrate button, as follows:

4. In the Manage Users row, click on the **Register a User** link.
5. Provide at least the required username, full name, and password (in addition, we highly recommend an e-mail address).
6. Click on the OK button.
7. Repeat the process for each new user.
8. Tell the users their usernames and passwords.

Note: If you require administrators to register participants, remember to customize the summit page so that it contains information on how people can contact administrators to request registration.

Create Groups

Although Forum defines many default groups, you may wish to grant a right to a group whose membership is defined by you. In most instances, you can complete an initial Forum configuration without defining a new group. However, it is helpful to know how to create groups for future administrative tasks.

There are several ways to define groups in Forum, and this Help section shows you one way. To define a group, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. Click on the Administrate button, as follows:

4. In the Manage Groups row, click on the **Create a Group** link.
5. In the “Create a group in...” page, provide a name for internal-Forum use in the Name text box (do not specify uppercase letters in this name), provide a lengthier description in the Full Name text box (such as "WidgetCo Managers"), and provide the usernames of the people to include in the group (separate names with spaces).
6. If you cannot remember people's usernames, click on the Search button, and Forum displays its standard user-selection window.
7. Click on the OK button.

Selecting Users

When specifying usernames in Forum, you can either type the usernames from memory, or you can have Forum assist you in building a user list. When Forum assists you in building this list, it displays the User Search Window.

To construct a list of Forum users with this page, do the following:

1. Provide a user search string in the "Search text" text box.

   User search strings can match the user's first name, last name, username, or any information in the user profile (for example, an e-mail address or organization name). This page matches partial strings (for example, "sam" matches "samantha").

   You can also use wildcard characters. For example, if you want to see a list of all the users whose usernames begin with the letter "p," then specify the following in the text box:

   ```
   p*
   ```

   To see a list of all of the users on this installation of Forum, specify an asterisk (*). Remember, though, that, if there are a large number of users on this installation, it may take Forum a long time to build the user list.
2. Click on the Search button.

   Forum places all of the usernames that match the search criteria in the Selection List text box, located in the lower-left portion of the page.
3. Click on the "Sort by" radio button that will assist you in scanning the usernames in the Selection List text box.

   You can sort by the user's first name, last name, or username.
4. Click (or Ctrl click) on the name (or names) of the users in the Selection List text box that you want to add to your list.

   Ctrl clicking is the method supported by Windows for choosing multiple items in a list. If you are using another system, use the method supported by your system.
5. Click on the Add button.

Forum places the usernames you chose in the Selected Users text box, which is located in the lower-right portion of the page.

6. Repeat this process until the Selected Users box contains all of the users you wish to choose.

   If you want to remove a name from the Selected Users box, click on the name, and then click on the Remove button.

7. Click on the OK button.

Setting Access to User Features

There are Forum features that we allow you to turn off, if they do not meet your organization's needs, or if they are counter to your organization's philosophies and policies.

To turn off user features, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. Click on the Administrate button, as follows:

4. In the Manage Users row, click on **the Manage Access to User Features and Options** link.
5. On the Manage SiteScape Forum Options and Features form, click on the check boxes of the features you want to turn off.
6. Click on the OK button.

The following is a list of the optional user features:

Allow registered users to create their own teams
: If you remove this check, only summit administrators can create teams

Allow registered users to create their own docshares
: If you remove this check, people cannot use the registration form or their user profiles to create personal docshare forums. (If personal docshare forums are not useful to the people in your organization, you can save considerable server disk space by preventing people from creating ones that they will never use.)

Allow registered users to create their own calendars
: If you remove this check, people cannot use the registration form or their user profiles to create personal calendars. (If personal calendars are not useful to the people in your organization, you can save considerable server disk space by preventing people from creating ones that they will never use.)

Allow registered users to access their My News folders

If you remove this check, people's Forum Tracker pages do not include a My News button. If you do not plan on implementing newspaper agents on your Forum installation, and if the Notifications folder is not of use to your users, then you can save disk space by eliminating this feature.

Allow registered users to run Chat
Some organizations see more disadvantages than advantages in allowing employees to chat. If you choose, you can turn it off and remove Chat buttons from this installation of Forum.

Allow registered users to receive individual mail notification messages (instead of "digest" style)
Allowing users to receive individual mail notifications allows them to view and post attached files. However, it can be taxing on your server. If you find that this feature is too computing intensive, then you can turn it off.

Permit email notifications to contain attachments
If you want users to access Forum before being allowed to see files attached to Forum entries, then you can turn off this feature.

Enable the use of file shortcuts
On NT server systems, you can allow people to create docshare documents that are actually shortcuts (pointers) to files in a directory on your server machine. In this way, users can edit the file in a shared directory, and they do not have to keep replacing the file in Forum's database. If you choose, however, you can turn off this feature.

Allow users to specify their own shortcut directories
If you disallow this feature, then administrators must create the shortcut directories.

Allow registered users to upload files
If you have problems with server disk space, if users continually attempt to upload files that are too large, or if you want more control over the content of uploaded files, then you can disable this feature.

Establish E-Mail Settings

To enable users to use the Send Mail feature in several forums, and to enable them to receive e-mail notificatons, you must provide Forum with information about your e-mail server. To establish e-mail settings in Forum, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. Click on the Administrate button, as follows:

4. In the Manage Summit row, click on the **Customize Mail Delivery** link.

5. Provide the name of the machine that runs your "outgoing" SMTP e-mail server software. Your system administrator can provide the name of this machine, if you do not know it. If the machine on which you installed Forum also runs an e-mail server, just specify "localhost".
6. If the default port name is not correct, change it. Again, if you do not know the port number of your e-mail server, consult with your system or network administrator.
7. Provide a default "return address" for all e-mail notifications sent by Forum. The address must have correct e-mail syntax, but it does not need to correspond to an actual e-mail account.
8. Click on the OK button.

Establish Settings for the Web File System

If server disk space is an issue, or if your organization or users do not find the Web File System useful, you can disable this part of Forum (which removes the "Web files" button from the summit page). Or, if you choose, you can specify a different base directory for the Web File System. (The default base directory for the Web File System is `/Avf/hidden/aca_dir/_webFileBase`.

To disable the Web File System, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. Click on the Administrate button, as follows:

4. In the Manage Web File System row of the table, click on the **Enable/Disable Web File System** link.
5. Click on the "Web File System state" drop-down menu, and choose "Disabled."
6. Click on the OK button.

To specify a different base directory for the Web File System, access the top summit's administrative tools menu, and, in the Manage Web File System row, click on **the Set WFS Base Directory** link. Then, follow the instructions on the "Set the Web File System base directory for..." page to choose another directory in which to place the file-system hierarchy.

When you use Forum's archive and restore feature, Forum does not archive the Web File System. If you want to back up the files contained here, you need to do that as a separate step.

Customize the Summit

Forum supports several ways to customize an individual summit or any forum in the installation. If you want to make customizations to Forum that go beyond "adding a note to the top of the summit" or "removing a button in the docshare forum," then we highly recommend that you use the *templates* method of customizing Forum. (See the Administrative Help system for more help on templates.)

However, using templates requires planning and time. We do not recommend that you learn about and implement templates before you get your installation of Forum up and running. However, if you made some of the changes mentioned in the "Initial Forum Configuration" Help section (for example, if you took the right away from anonymous users to register themselves), then you will need to make some simple, preliminary customizations to the summit page (for example, adding a note telling anonymous users whom to contact to obtain a username and password).

To make simple or preliminary customizations to your summit page, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. Click on the Administrate button, as follows:

4. In the Manage Summit row, click on the **Customize the Summit** link.
5. On the "Customize..." page, click on the **Modify Summit with basic customizations** link.
6. On the next "Customize..." page, Forum displays a standard HTML form that allows you to provide new information and features to the summit, or allows you to change some existing information and features. The following are examples of common customizations made using this page:
   - Change the title of the summit, and add introductory text to the top of the page. (Introductory text can be different for registered users, called "participants," and anonymous users, called "visitors.")
   - Replace the summit banner with a company or organization logo
   - Remove links that are not appropriate for your summit (links to administration tools or to online Help).
   - Change the background color of the summit page.

Create a Docshare Forum

SiteScape Forum's primary application for online collaboration is the docshare forum. In this forum, people can have discussions, share documents, share URLs, and conduct polls. An initial configuration of Forum requires at least one docshare forum.

To create a docshare forum, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. Click on the Administrate button, as follows:

4. In the Manage Forums row, click on the **Create a Summit or Forum** link.
5. On the "Create a Forum in..." form, and in the Title text box, provide a title for your docshare forum (for example, "WidgetCo Employee Open Discussions" or "Widget Version 2.3 Project Discussions and Documents").
6. In the "Directory name" text box, provide a name for the forum that Forum uses internally (for example, "widgetco_docshare").
7. If you want someone other than yourself to be the owner of the forum, specify the username of the person you wish to be the owner.
8. Click on the "Discussions and Document Sharing" radio button.
9. Click on the OK button.

On the summit page, in the "Discussion and Document Forums" section, Forum displays the title of the docshare forum that you provided in the Title text box of the form. Click on the linked title, and Forum displays the top folder of that new docshare forum. (The top folder, by default, is empty.)

To provide some introductory text in the top folder of the new docshare forum, click on the Modify button, and then click on the **Modify this folder** link. Provide introductory text in the Description text box, and click on the OK button.

Enable Docshare For E-Mail Postings and Notifications

In order for users to receive e-mail about new activity in a forum, you need to access the forum, and specify a "notification schedule." A notification schedule indicates how often Forum collects information about new activity and sends notification e-mail to users.

In addition, as an option, you can enable automatic posting to the forum through e-mail. If you enable this feature, then users can send e-mail to an e-mail account, and Forum automatically places the contents of the e-mail into the forum as a discussion topic (by default).

This process must be repeated for every docshare forum for which you want to enable notifications and automated postings.

Enabling E-Mail Notifications

To enable notifications and postings in an individual docshare forum, do the following:

1. View the summit page.

2. Log in as a member of the SSF Administrators group (by default, **wf_admin**), if you have not already.
3. In the "Discussions and Document Forums" section, click on the hyperlinked name of the Discussion and Document-Sharing forum in which you want to enable e-mail notifications.
4. Click on the More button, as follows:

5. Click on the **Forum Administration** link.
6. In the Mail Notification row, click on the **Set Mail Notification Schedule** link.
7. In the "Set Mail Notification Schedule for new items in..." form, and in the "Set notification message content level" section, click on either the "Send titles only" or the"Send titles and summaries" radio button.

   If you specify that you want the notification e-mail to contain a summary, then Forum includes a few lines of the discussion topic or document abstract in the e-mail so that the user can get an indication of the context of the new entry. If you specify this option, you must also specify the number of lines you want included in the summary. We recommend that you specify "a few lines" (2 or 3).
8. In the "Set the mail notification schedule" section, specify the days on which Forum should send notifications; specify the days by clicking on the checkbox under the days of the week on which you want to send notifications.

   In the same section, specify the times during the day when you want Forum to send notifications about new activity in this forum. You must specify the times using 24-hour format, and you must separate the hour value from the minute value using a colon (:). The following is an example of a schedule that sends notifications every hour and a half during a "nine to five" working day:

   ```
   09:00   10:30   12:00   13:30   15:00   16:30
   ```
9. Click on the OK button at the bottom of the form.
10. You have just enabled e-mail notifications in this individual forum.

    By default, user accounts are configured to receive e-mail notifications. However, users can use several methods to turn off e-mail notifications. If e-mail notification is working properly but one user is not receiving their e-mail notifications, have them follow these steps:

    A. View the summit page.

    B. Click on the hyperlinked name of the Discussion and Document-Sharing forum for which the user wants to receive e-mail notifications.

    C. Click on the More button, as follows:

D. Click on the **Set Notification** link.

E. In the E-Mail Notification section, click on one of the following radio buttons:

Use Forum Default Email Notification
Receives e-mail notifications, as long as a summit administrator includes the user in a distribution list. (The two choices that follow result in the user getting e-mail notifications regardless of whether the administrator placed the user on a distribution list.)

Enable Email Notification (Digest Style
Receives one e-mail notification with a summary of all activity since the last notification. (This style does not include files attached to new or modified docshare entries in the notification e-mail message.)

Enable Email Notification (Individual Message Style)
Receives one e-mail notification for every new or modified entry in the docshare forum. (This style includes files attached to new or modified docshare entries in the notification e-mail message.)

F. Click on the OK button at the bottom of the form.

G. Repeat this process for each forum about which the user wants to be notified regarding new activity.

Another way to do this is to have the user access her or his user profile, click on the Modify icon in the toolbar, and, at the bottom of the modification page, specify which forums to enable for e-mail notification.

Automated E-Mail Postings

The following steps describe how to enable a forum for automated e-mail postings.

1. Create an e-mail account on your POP e-mail server.

   When users want to post an e-mail message to the forum, they send mail to the account that you create. Forum then takes mail from that account and places the e-mail contents into a discussion topic or reply. (If you do not know how to set up an e-mail account on your server, contact your network or system administrator.)

   You may want to name the account in a way that indicates into which forum the e-mail will be posted. For example, "post_widgetv1," "post_cust_support," or "post_marketing."

   Finally, there is a one-to-one correspondence between one e-mail account and one forum. If you want to enable posting to a second forum, you need to create a second e-mail account that feeds postings into the other forum.

2. View the summit page.

3. Click on the hyperlinked name of the Discussion and Document-Sharing forum in which you want to enable automated e-mail postings.

4. Click on the More button, as follows:

5. In the Miscellaneous row, click on the **Manage Postings to this Forum via Email** hyperlink.
6. Provide the name of your "incoming" e-mail POP server in the first text box of the "Manage Email Postings to this Forum" form.
7. In the second text box, supply the name of the account that you created that will feed e-mail into the Forum. (Users send e-mail to this account in order to submit discussion topics into this docshare forum.)
8. In the third text box, supply the password for the newly created e-mail account.
9. Click on the Enable Postings button on the bottom of the page.

Set Access to the Docshare Forum

When you set access to the docshare forum, you determine who has the right to perform certain tasks. There are several ways to access a docshare's ACL table. This Help section shows one way to do it.

To alter the default access-control settings for the forum, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. In the "Discussions and Document Forums" section, click on the linked name of the Discussion and Document-Sharing forum in which you want to enable e-mail notifications.
4. Click on the More button, as follows:

5. Click on the **Forum Administration** link.
6. In the Security row, click on the **Set Access Controls** link.
7. Forum displays the user database's *access-control-list table* (also called an *ACL table*).
8. Check and uncheck the boxes to alter the access control to the user database. Altering this access affects activities such as creating entries, modifying them, attaching files, posting topics through e-mail, and so forth. The following are common alterations to this table:
    - Remove the checks from the Registered Users row, and in the Create Entries and Add Replies columns. After making this change, registered users can view but not participate in the forum. Then, click on the existing

group hyperlink toward the top of the page, and add a group to the table. Finally, grant the newly added group the privileges to Create Entries and Add Replies. In this way, a subset of the registered users participate, every other registered user may only view the entries.

- Repeat the steps in the previous example, except that you remove the check from the Registered Users row and the Read Folders and Entries column. Add one or more groups, and grant the Read Folders and Entries privilege to only the groups you choose. In this way, only members of chosen groups can read or participate in this forum.
- Create a group, allow its members the right to Administrative Tasks, but do not assign it the right to modify the ACL table. In this way, you have delegated administrative tasks. So, members of SSF Administrators can concentrate on administering the top summit, and the group to whom you delegated administrative rights can administer the docshare forum.
- Further restrict the right to delete, attach files, or have administration privileges.

The ACL Table for Docshare Forums

The following are the rights in the ACL table for summit access:

Read Folders and Entries
View the entries.

Create Entries
Create topics, documents, URLs, and surveys.

Add Attachments
Attach files to docshare entries.

Add Replies
Reply to docshare entries.

Create Folders
Add folders.

Modify Folders and Entries
Change information about or the contents of folders and entries.

Delete Folders and Entries
Delete an existing entry in a docshare forum.

Administrative Tasks
Accessing the docshare forum's administrative tools menu, and performing all of the tasks in that menu, except for modifying the ACL table.

Modify Access Control
Change values in this table.

Create Entries via Email
Post topics to the forum by sending an e-mail message to a dedicated account.

Add Replies via Email

Post replies either by hand or by replying to a notification e-mail message.

Allow Entries to be Imported

Use the Import part of the Import/Export menu item. (Since importing entries imports any associated custom commands or workflow processes, it may be helpful to control the importing of the entries.)

Provide “Getting Started” Information for your Users

Users will be more likely to participate in your installation of Forum if they know how to use the software. You can point them to the following sources of information:

- *Quick Start Guide for All Users*

  This manual includes information for new users of SiteScape Forum. Topics include registering, logging in, navigating, viewing entries, adding entries, and more. This guide is nearly identical in content to the two links specified in the next list item.

- "Getting started..." in the User Help System

  To access this information, have the users do the following:

  1. View the summit page.
  2. Click on the Help button, as follows:

  3. Locate the table toward the bottom of the page, and click on the links under the "Getting started..." header.

     These links include topics such as logging in, registering, adding a discussion topic, adding a reply, and more.

     The last link in the "Getting started..." section of the table is **the Read more getting started information** link. That link includes information on searching for entries, searching for users, notifications, tracking, viewing Forum pages in different languages, and more.

Create the Toolkit Help System

If the users of your installation of Forum include programmers who are customizing Forum by writing code in its native language, then you may want to build the Toolkit Help. (If you do not build the Toolkit Help system, then your users will generate an error when they click on the Toolkit Help button.)

To build the Toolkit Help, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).

3. Click on the Help button, as follows:

4. Click on the Administrate button, as follows:

5. Click on the **Create the SiteScape Forum Toolkit Help Facility** link.
6. Reload the top frame of the Help window.
7. Click on the Toolkit Help button, as follows:

Forum builds the Toolkit Help system and reports its progress in the bottom frame.

Read "Getting the Most Out of Forum"

This brief manual describes common roadblocks to online collaboration and how to set up Forum (and work within your organization) to overcome these roadblocks.

Creating a Custom Command

As one docshare customization option, you can create *custom commands*. Custom commands appear in the Add menu (with "Add Discussion Topic," "Add Document," "Add Url," "Add Survey Question," and "Add Folder" standard commands). You define the name of the custom command (for example, "Submit Defect Reports"), and you use the docshare administrative menu to define the HTML elements (text boxes, labels, tables, lists, drop-down boxes, and so forth) that are a part of the command.

There are several ways to customize the summit page and the other types of forums. If you are planning on doing extensive customizations, we recommend that you use the *template* method of customization. Try defining and testing a custom command as a learning experience. Then, read about all of the Forum customization choices, and choose the ones that best serve your purpose.

The following list describes how to create a custom command called "Submit Defect Reports," and describes how to alter the default docshare menus and toolbars:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. In the "Discussions and Document Forums" section, click on the linked name of the Discussion and Document-Sharing forum in which you want to create a custom command.
4. Click on the More button, as follows:

5. Click on the **Forum Administration** link.
6. In the Customizations row, click on the **Add or Delete Forum Buttons** link.
7. Check the boxes next to the buttons you want to appear in the Folder, Entry, or Reply toolbars. Consider the following:
   - To use the default toolbar buttons, leave all boxes unchecked.
   - Checking "Spacer" adds additional horizontal space between the previously specified button and the next one.
   - You can add non-default buttons to the toolbars, such as Up Level (go to the next highest folder), Add Topic, Add Document, and Add Reply.
8. After you specify the buttons you want to appear in the toolbars, click on the Apply button.
9. Click on the Close button at the bottom of the page.
10. In the Customizations section of the administration table, click on the **Add or Modify Forum Commands** link.

11. You use the "Add or Modify Forum Commands for..." form to add or remove commands from the docshare Add menu. The following is an example of how to create a "Submit Defect Report" command, and how to alter the Add menu so that defect reports are the only types of entries that can be added to this forum:

    A. Enter "Submit Defect Report" in the "Add a new Forum Command" text box.

    B. Click on the Add button directly below the text box.

    C. Use the "Define the...command in..." form to specify the form elements of the "Submit Defect Report" command.

       The rest of the steps in this section are provided as an example only and are not intended to be a functional, new, Submit Defect Report command. Implementing a functional Submit Defect Report command would take more steps.

    D. In the General Purpose Elements section (approximately three quarters of the way down the page), click on the Select Box radio button in the left-most column of the table (located approximately half way down the table).

    E. In the same row of the table, next to the Select Box radio button, enter "Operating System" in the text box in the second column of the table.

    F. In the third column of the table, click on the "User input required" checkbox.

    G. In the same column, under the "User input required" checkbox, enter the following in the large-area text box:

       ```
       Linux
       Solaris
       Windows NT
       Windows 95/98
       Tru64 UNIX
       ```

       Be sure to place each system label on a separate line.

    H. Toward the bottom of the table, click on the Add button.

       Toward the top of the page, view the last row in the Current Data Element Selections table.

       In addition to the default command elements (a title, a description box, and so forth), the Submit Defect Report command now includes the select box that we just defined, and it places the select box at the bottom of the command's page, just below the Add Attachments part of the form.

    I. In the Current Data Element Selections table, click on the Title radio button, and, toward the bottom of the table, click on the Modify button.

    J. In the "Modify a data element" page, in the second column (labeled "Caption"), change the contents of the text box to read "Defect Summary", and click on the OK button.

Again, view the Current Data Element Selections table, and notice that, in the second column of the first row, the new title caption is now "Defect Summary." In this way, you can change the labels for the default elements so that they are more consistent with your custom command.

K. At the bottom of the page, click on the Close button.

L. In the Customizations row of the administrative table, click on the **Add or Modify Forum Commands** link again.

M. In the "Select the standard forum commands to be enabled" table (the third table down the page), remove the checks from the following boxes: Add Discussion Topic, Add Document, Add URL, and Add Survey Questions.

   This action removes all of the "Add..." entry commands from the docshare Add menu except for the Submit Defect Report command. In this way, you create a forum dedicated solely to the processing of Defect Reports. Users can enter Defect Reports, add attachments to them, and reply to them. That is all.

N. Click on the Apply button below the table.

O. Click on the Close button at the bottom of the page.

12. Click on the Close button at the bottom of the "Administration Tools for..." page.

Creating a Workflow Process

A docshare workflow process defines a specific set of users who have the right to work on an entry, and defines an orderly and predictable process through which the entry must pass. You can associate a workflow process with a standard docshare entry or with a custom command.

> **Note:** The workflow feature is implemented as a separately purchasable software product. It is not part of the default Forum product.

When you associate a workflow process with a docshare entry, at any time, you are able to track the work done on the entry, knowing exactly where in the process it is. Also, if the process is not complete, it is clearly defined who needs to take what action with the entry in order to move it along to the next step. Examples of workflow applications include (but are not limited to) a document "review cycle," defect reports at a customer Help Desk, and a purchase-order approval cycle.

We recommend that you create a sample workflow process as a learning experience. The following list describes how to create a workflow process called "Processing Defect Reports," and describes how to alter the default docshare menus:

1. Purchase the Workflow software from SiteScape, and specify the registration key to Forum.
2. View the Forum summit page.
3. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
4. In the "Discussions and Document Forums" section, click on the linked name of the Discussion and Document-Sharing forum in which you want to create a workflow process.
5. Click on the More button, as follows:

6. Click on the **Forum Administration** link.
7. In the Customizations row, click on the **Define Workflow Processes** link.
8. In the Add a New Workflow Process text box, enter "Processing Defect Reports", and click on the Add button.

   Examples of Workflow processes include "Private-to-Public Documentation Review" or "Purchase Orders." This section uses an example in which a Quality Assurance and Support team must process defect reports from customers.
9. Remove the check from the "Allow this workflow process to be initiated from the entry tools menu" checkbox, and then click on the Apply button directly below the checkbox.

In a later step, we will set up this workflow process so that it is automatically initiated. In the example, we do not want users to initiate their own processes. (Checking this box places an item on the Tools menu that allows users to associate and initiate the workflow process for any type of standard or custom entry that they create. The standard entries are discussion topics, documents, URLs, or survey topics.)

10. Click on each of the links in the "Workflow Process Definition" section.

    The following steps describe how to define a process for Support workers who are processing defect reports from customers. The steps illustrate how to set up a workflow process, and do not implement a robust, "production-ready" product-defect workflow process. Creating such a production-ready process requires more steps.

    A. In the Workflow Process Definition section, click on the first link, which is the **Define the workflow states** link. In the "Workflow States" text box, specify the following:

       Open, Need More Information, Closed

       In the "Initial Workflow State" text box, specify the following:

       Open

       When a customer submits a defect report, it automatically is placed in the Open state, which tells the Support workers that there is a Defect Report in need of their attention. The Support workers can place the entry in the Need More Information state, if they require more information from the customers. Once the problem has been resolved, the state changes to Closed.

    B. Click on the OK button to complete work on the "Define the states for workflow process 'Processing Defect Reports.'"

    C. Click on the third link, which is the **Define the state transition criteria** link.

       This example does not use the **Define the questions asked during each state** link, which would often be used in a production-ready workflow process. However, it is often helpful to skip this step, work on other steps, and then go back and define questions.

    D. In the "Define a transition directive" section of the page, click on the following items in each of the three table columns:

       Open   Allow manual transition   Need More Information

       Then, click on the Add Directive button located below the table.

       This directive indicates that, when the Defect Report is in the Open state, one of the Support workers will be able to manually change the state to "Need More Information," if that is appropriate.

E. Continue to work with the "Define a transition directive" table, specifying the following directives:

Open	Allow manual transition	Closed
Need More Information	Allow manual transition	Open
Need More Information	Allow manual transition	Closed

These directives allow the workers to move the entry manually through the states, as needed. This type of process requires a high level of trust that the Support workers know what they are doing and can move the entry through the process appropriately.

Forum also allows you to specify an automatic state change depending on someone replying to the Defect Report or based on how specific users answers a question ("Is the customer satisfied with your solution?").

F. When finished, click on the Close button on the "Define the State Transition criteria for..." page.

G. Click on the fourth link, which is the **Define the access rights** link.

H. Use the "Setup the list of 'Selected Users'" sections at the bottom of the page to determine the list of users who have the right to view and work with Defect Reports.

Do the following to set up this list:

I. If you have a small number of registered users on your summit, type an asterisk (*) in the "Enter a list of user names" text box, and then click on the OK button to the right of the box.

If you have a large number of registered users on your summit, manually type into the text box the usernames of the Support workers whom you want to have access to the defect reports, and separate each username with a space.

II. In the "Select the users to be added" box, press and hold the Ctrl button, click on each of the usernames of the people who have the right to work with Defect Reports (the usernames of the Support workers), and release the Ctrl button. All of the usernames you clicked on should be highlighted. Then, click on the Add--> button. This places the highlighted usernames in the Selected Users text box.

III. View the middle table, which is the "Specify the access rights for each state" table. In the rightmost column, toward the bottom, under the "Selected users" checkbox, the Forum provides a list of the names you chose using the text boxes toward the bottom of the page.

I. In the "Specify access rights for each state" section, in the leftmost column, click on "Open," highlighting the word. Then, in the second column, press and hold the Ctrl button, click on "View" and "Respond", highlighting them. Next, in the rightmost column, click on the Entry Creator and Selected Users check boxes. When finished, click on the apply button just below this table.

This action gives the person who created the entry and those users whom you selected in previous steps the right to view and to create replies to the Defect Report. To all other registered and anonymous users, the Defect Reports are invisible (those users do not have the right to "view" the entries).

J. Use the same table to specify the following access rights, and click on the Apply button after entering each set of rights:

Open	Modify or Delete	Entry Creator
Open	Change State	Selected Users
Need More Information	View...	Entry Creator...
	Respond	Selected Users
Need More Information	Modify or Delete	Entry Creator
Need More Information	Change State	Selected Users

These rights allow only the entry creator to modify or delete the Defect Report in the first two states. It also specifies that only the users you selected (the Support workers) have the right to change the state of the entry. The rights while the Defect Report is in the Need More Information state are identical to the rights when the report is in the Open state. For the Closed state, we simply use the Forum default access controls.

K. When finished, click on the Close button at the bottom of the page.

L. Click on the fifth link, which is the **Define the notifications to be done** link.

M. In the "Define the notification directives" section (the second section), in the leftmost column, click on the word "entering." Then, in the second column, click on the "Need More Information" item. Next, in the rightmost column, click on the Entry Creator checkbox. Finally, click on the Apply button just below this table.

When a Support worker places the Defect Report in the Need More Information state, the Forum automatically sends e-mail to the customer who entered the Defect Report. So, the entry creator knows that she or he needs to provide more information in order for the problem to be solved.

N. In the leftmost column, click on "exiting." Then, in the second column, click on "Need More Information." Next, in the rightmost column, click on the "Selected users" checkbox. Finally, click on the Apply button just below the table.

After more information has been provided and someone has changed the state from Need More Information to another state, the Forum automatically sends e-mail to the Support workers. This way, the Support workers know when more information has been provided and when they can begin to work on the Defect Report again.

O. Click on the close button on the bottom of the page.

P. Click on the Close button at the bottom of the "Configure the states..." page.

11. In the docshare's administrative tools menu, in the Customize row of the table, click on the **Add or Modify Forum Commands** link.
12. Click on the Submit Defect Report radio button in the "Select the commands to be modified or retired" table (the second table), and click on the Modify button just below the table. (You create the Submit Defect Report command by completing the getting started Help on custom commands. If you did not complete that tutorial, the "Select the commands to be modified or retired" table may be blank, and you cannot complete these steps.)
13. In the Associated Workflow Processes drop-down list (located in the upper-right corner of the page), choose the "Processing Defect Reports" item, and then click on the Apply button just below the list.
14. Click on the Close button at the bottom of the "Define the...command in..." page.
15. Click on the Close button on the bottom of the administration tools page.

Whenever a user creates a Defect Report using the Submit Defect Report command in the docshare Add menu, the Forum creates the custom entry, and automatically initializes the Processing Defect Reports workflow process, placing the entry in the Open state. The custom command and the workflow process are "associated"; you cannot have one without the other.

As another option, you can specify that the Forum place an item in the More menu that allows users to associate the workflow process with any created entry.

Deciding to Create New Summits

If your installation of Forum serves a large number of users with diverse needs, and if your installation is likely to include a very large number of forums, it would be helpful to create multiple summit pages. (In this situation, if you do not create multiple summit pages, the default summit page will be very crowded, and difficult to use and manage.)

One way to create a new summit page is to create a new *Access Control Area* (*ACA*). A new ACA has a completely separate user database. So, if you need the new summit page for a group of users that are completely or significantly different than the users in your default summit, create a new ACA.

For example, if your default summit is for "internal employee use only," and if you want to create a summit as an interface between your employees and your customers, create a new ACA. (The second user group is not a subset of the first.)

Another way to create a new summit page is to create a *cascading summit*. Cascading summits create a summit hierarchy, much in the same way that a folder and its subfolders create a folder hierarchy. The "parent" summit lists the hyperlinked title of any cascading summits on its page, and they both use the same user database. So, if you need the new summit page for a group of users that are a subset of the users in your default summit, then create a cascading summit.

For example, if your default summit has company-wide access, and if you want to create a summit for the employees in the Marketing Department, then create a cascading summit. (The second user group is a subset of the first.)

Creating a New ACA

To create a new ACA and summit page, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. Click on the Administrate button, as follows:

4. In the Manage Summit row of the table, click on the **Advanced Administration Options** link.
5. In the Miscellaneous Utilities row of the table, click on the **Create a New ACA** link.
6. Fill out the "Create a new Access Control Area (ACA)" form, and click on the OK button at the bottom of the page.

   Note: Remember the name of the new ACA and the password you specified. You will need these identifiers later.

When you create a new ACA, Forum automatically creates a new summit page that is associated with the new ACA. To access the ACA, you specify the same URL as you did to access the summit page created by the original installation, except that you supply the name of the newly created ACA instead.

For example, let's say that you accepted the default value of aca-1 for your original installation, and let's say that you specified new-aca when you created the second ACA. You access the initial summit using the following URL:

http://www.company.com/avf/aca-1/dispatch.cgi

You access the newly created ACA using the following URL:

http://www.company.com/avf/new-aca/dispatch.cgi

Creating a Cascaded Summit

When you create a cascaded summit whose administration you may want to delegate to a group of administrators in the future, you need to create the new administration group before you create the cascaded summit. To create a cascaded summit, do the following:

1. View the summit page.
2. Log in as a member of the SSF Administrators group (by default, **wf_admin**).
3. Click on the Administrate button, as follows:

4. In the Manage Groups row of the table, click on the **Create a Group** link.
5. Provide a name (internal use only, and be sure not to use any uppercase letters) and full name for this group, which will be the group of people allowed to participate in the new summit.

   Given the example of creating a new summit for the Marketing Department off of a main summit for all company employees, you can name the new group Marketing Department.

6. In the Owner text box, type the name of the person who will be the new summit's administrator.
7. As an option, you can specify the usernames of all of the members of the group in the members text box. Or, you can leave it blank and let the Owner fill in the members names later. (The owner of a group has the right to modify the group's membership.)
8. Click on the OK button.
9. In the top summit's administrative tools menu, in the Manage Forums section, click on the **Create a Summit or Forum** link.
10. Type in a title (using our example, "Marketing Department Summit" may be a good title).

11. In the second text box, enter a directory name (marketing_summit).
12. In the third text box, specify the username of the person who will be the owner of the summit. (This is the same username that you specified as the owner of the group you just created.)
13. Click on the Cascaded Summit radio button in the Primary section.
14. Click on the OK button toward the bottom of the page. Then, click on the Close button of the Create Forum Status page.
15. After Forum displays the administrative tools menu again, click on the linked title of the summit at the top of the page, which returns you to the top-level summit.
16. On the summit page, notice the new section added for the newly created cascaded summit, which is titled, "Summits."
17. Click on the linked title of the newly created summit (in the example, **Marketing Department Summit**).

    Notice that you, as a summit-level administrator of the top-level summit, have the right to access the cascaded summit.
18. On the cascaded summit page, click on the Administrate button.
19. In the Manage Summit section, click on the Control Access to the Summit and Administrative Tools link.
20. In the text toward the top of the page, just above the access-control table, click on the **existing group** link.

    You are going to add to this table the group you created earlier and set up the privileges so that this summit is private to the group.
21. On the "Include Groups for Access Control in..." form, click on the group you created earlier (using our previous examples, either Marketing Department or Marketing Department Summit). Then, click on the OK button at the bottom of the form.

    Back on the "Control Access to..." page, notice that Forum added a row to the bottom of the table for the group you just specified.
22. In the newly created row (using our example, Marketing Department or Marketing Department Summit), click on the checkbox in the View Summit column.
23. Remove the checkbox from the Registered Users and Anonymous Users rows, and the View Summit column.

    By removing these checks, the only users who now have the right to view the cascaded summit are members of the group you created, the owner of the cascaded summit (Forum Owner), and administrators of the top-level summit (SSF Administrators). The owner of the summit can modify the group membership (in our example, Marketing Department) by adding or subtracting usernames as she or he requires, which automatically grants and removes access to the cascaded summit.

24. Click on the Apply button.

The main issue of concern when working with cascaded summits is to provide a way to "pass off" administration of the new summit to another user. The only way to do this without granting the person global administrative privileges for all of the forums in an ACA is to perform the tasks shown in the previous steps: create a group, and assign the person ownership of both the cascaded summit and the newly-created group.

If the owner wants to use another group in the access control table of the cascaded summit, the owner does not have enough privilege to create a group and must ask an ACA-wide administrator (SSF Administrators) to create the group for her or him. For example, a member of the SSF Administrators group can create a group called Marketing Admin and assign ownership to the owner of the cascaded summit. Then, the owner of the cascaded summit can populate the group, place it in the access-control table, and use it to implement an administration group local to the cascaded summit.

Next Steps

Forum’s Administrative Help system contains the following information that you may find useful in the future:

- Using the summit’s administrative tools menu
- Administering individual forums
- Architecture, system tuning, and troubleshooting information
- Using templates and other customization methods

For support assistance, help in developing your Forum customizations, or additional documentation, please access SiteScape’s support, customization, and help forums, as follows:

Support:	http://support.sitescape.com/forum/support/dispatch.cgi/support
Customization:	http://support.sitescape.com/forum/support/dispatch.cgi/custom
Help:	http://help.sitescape.com/

The discussions in these forums–especially the customization forum–give you an idea how other customers are using Forum and how our software may be able to assist your organization.